

AGENDA
TEXCOM MEETING
Trusts and Estates Section
State Bar of California

April 27-29, 2007
Hyatt Incline
Incline, Nevada

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"Have a seat. Taxes is in with him now."

FRIDAY, APRIL 27, 2007
10 am-4pm

**I. WELCOME, INTRODUCTIONS AND REPORTS OF CHAIR/VICE CHAIR
(40 minutes)**

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|----|--|----------|
| A | Welcome | [HARTOG] |
| B. | Approval of Minutes of January Meeting | [HARTOG] |
| C. | Report of Chair (15 min)
Section Sponsorship of "Leopard Lounge"
ETHICS GUIDE [Lodise] | [HARTOG] |
| D. | Report of Vice Chair (10 min)
Finance and Budget – Financial Report | [STERN] |
| E. | Report of Section Administrator (15 min)
Work-Room Tutorial | [ORLOFF] |

II. SPECIAL DISCUSSION TOPIC

REPORT OF THE EATE STUDY GROUP

SATURDAY, APRIL 28
9am-12:30pm

COMMITTEE, TASK FORCE AND LIAISON REPORTS

- I. INCAPACITY (50 minutes) (TONG)**
- A. STANDING COMMITTEE PROBATE AND MENTALHEALTH – PROPOSALS FOR COMMENT MAY 1, 2007 (STERN)
- B. JUDICIAL COUNCIL CONSERVATORSHIP TASK FORCE REPORT (LODISE)
- C. PENDING BILLS (Developments) (MEMBERS)
- | | |
|---|--------------|
| AB 267 (Calderon – Annuity Sales) & SB 573 (Scott-Annuity Sales) | Corey |
| AB 316 (Spitzer – Conservatorship Investment Standards) | Stern |
| AB 1727 (Jones – Omnibus Act clean up bill) | Stern |
| SB 183 (Corbett – Estate of Lowrie W&I Code sec 15657.3) | Tong |
| SB 241 (Kuehl – Representation of minors in probate proceedings) | Wallet/Salus |
| SB 611 (Steinberg – Elder Financial Restitution Act, attachment) | Corey |
| SB 800 (Corbett – care plans, reinstitution of general plan) | Lodise |
| AB 1727 (Jones – deals with P.C. 21350 issues) | CLRC |
| SB 340 (Ackerman – criminal history of care givers) | TBA |
| SB 367 (Corbett – spot bill) | Lodise |
| AB 1689 (Lieber – Revised Uniform Anatomical Gifts Act) | Estate Plan |
| AB 378 (Benoit) – Elder and dependent Adult Abuse | TBA |
| AB 749 (Berg) & AB 949 (Krekorian) RCFEs | Lodise |
| AB 1178 (Hernandez – Medical Information Disclosures | M. Sallus |
| AB 1298 (Jones – Personal information disclosure) | TBA |
| AB1302 (Horton – HIPAA) | Stern |
| AB 1424 (Davis – Elder Abuse) | TBA |
| AB 1526 (Lieber – Housing for elderly or disabled persons) | TBA |
| AB 500 (Lieu – telephonic appearances in probate & conservatorship Proceedings) | TBA |
| AB 387 (Alquist – Death or incapacity of dentists) | TBA |
- D. EDUCATING SENIORS (KOSLOFF)
1. Speakers Bureau
 2. Use of AMA funds
 3. Senior Information Card dissemination (Doyle/Kosloff)
- E.. PROBATE CODE § 1470 (APPOINTED COUNSEL FOR ALREADY REPRESENTED) (BELTRAN)
- F. MEDI-CAL UPDATES (STERN)

G Arbitability of Elder Abuse Cases

(Corey)

II. ESTATE PLANNING (60 min)

[MACDONALD]

1. COPRAC Opinion 05-003
2. COD Resolution on PC 6402.5
3. Formal Will Witness Requirements
- 4 .Gov't Code 8201-Notary Public Education
5. AB 250 Revocable TOD Deeds
6. AB 861 ATRO
7. AB 374 Compassionate Choices Act
8. State Bar Brochures
9. AB 703 Locked Cabinets: Social Security Numbers:

(Schenone)
(Ehrman)
(Reggiardo)

(Ito/MacDonald)
(Ehrman)
(Tong)
(Ehrman)
(Ehrman)

III. CONFERENCE OF DELEGATES (80 minutes)

(HENDEN)

SEE ATTACHMENTS

IV.. CLRC (20 min)

[HORTON]

- A. No Contest Clause Study
- B. Care Custodian Task Force

[Kovar]
[Horton]

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SUNDAY, APRIL 28

8:30am-12:00pm

I.. TRUST & ESTATE ADMINISTRATION (75 min) [BURGER]

- A. Attorney Fee Shifting Proposal
- B. Increased Limits on 13100 proceedings SB 553
- C. Creditors' Claim harmonization AB341 (Hartog)
- D. AB 604
- E. Incapacitated Dentists SB 387

II.. LEGISLATION (5 min) [REGGIARDO]

- 1 Timeline for TEEComm legislative proposals
- 2 Mandatory procedures re legislative proposals
- 3. Online Bill Tracking legislative information:
www.leginfo.ca.gov/

IMPORTANT GUIDELINES:

- Please use approved format for legislative proposals.
- Please use approved comment form for legislation comments.
- Always write to Larry Doyle, not directly to a member of legislature or legislative staff.
- Confirm testimony needs with Legislation Chair.
- If you agree to testify, be there unless otherwise notified

III.. LITIGATION (10 min) [KOVAR]

New Cases (Zabronsky)

IV.. TECHNOLOGY (5 minutes) [GAW]

- a..E-Newsletter
- b.Website
- c.Protocols

V. MEMBERSHIP & MARKETING (5 min.) [KOSLOFF]

VI. INCOME AND TRANSFER TAXES (5 min) [HAYES]

VII. CEB (5 min) [GOOD]

VIII. EDUCATION (10 min) [ALBERIO]

- 1. State Bar Annual Meeting Programs
- 2. Stand Alone programs
Advanced Topics

- Botched Trusts
3. 2007/2008 Winter SEI
4. Your Legal Rights

- IX.. QUARTERLY (5 min)**
1. Manuscripts
2. Electronic Dissemination

[HAND]

- X.. NCCUSL (5 min)**

[GODSHALL]

- XI. NEW BUSINESS**

- XII COMING ATTRACTIONS**

**NEXT TEXCOM MEETING
JUNE 16, 2007
9:30 am-3:30pm
OAKLAND HILTON**